

## Checklist for Organizations Implementing Training (TR) and/or Human Resources (HR) CHRIS Workflow Processes

This checklist includes a number of activities requiring that information be provided to the CHRIS staff in order to set-up the organization's Workflow process(es). Please transmit the workflow set-up information ("\*" asterisked below) as an email attachment to Greg Waggett at [chris@netl.doe.gov](mailto:chris@netl.doe.gov) and Chuck Patterson at [Charles.Patterson@hq.doe.gov](mailto:Charles.Patterson@hq.doe.gov) in keeping with the deadline corresponding to the roll-out date specified by the organization.

- \_\_\_ Designate a Workflow Point of Contact (POC) for each process (i.e., TR and HR).\*
- \_\_\_ Specify a roll-out date for your organization from the attached timetable.\*
- \_\_\_ Determine the # of steps for each Workflow process and assign a functional role to each step.\*
- \_\_\_ Compile a listing of individuals for each Workflow step including the employee ID number for each individual.\*
- \_\_\_ Assure that all individuals who will be using Workflow have current DOE email addresses.
- \_\_\_ Specify which individuals who will be using Workflow are presently detailed from another Federal agency and assign a "sponsor" for purposes of setting up their CHRIS access and approval levels.\*
- \_\_\_ Assign new sponsors to "detailees" as current sponsors leave their organizations in order to maintain the detailees' CHRIS user access.\*
- \_\_\_ Assure that all individuals needing CHRIS Workflow access: a) complete a **Workflow Request Form** (available at [http://chris.inel.gov/end\\_user/index.htm](http://chris.inel.gov/end_user/index.htm)), b) have it certified by their POC, and c) send it via fax to Greg Waggett, CHRIS Security Officer at 304-285-4553 or by next day mail delivery service to: Greg Waggett, 3610 Collins Ferry Road, Morgantown, WV 26507-0880.
- \_\_\_ Develop a plan and timetable for educating the employees and managers of your organization on the use of the Training Workflow process.
- \_\_\_ As needed, modify Workflow handout materials developed by the CHRIS Project Team prior to distribution to employees and managers.
- \_\_\_ "Go-live" with CHRIS Training Workflow in accordance with the roll-out date specified for your organization from the following timetable.

## **Timetable for CHRIS Workflow Roll-Outs**

The following timetable provides the deadlines by which Workflow set-up information must be submitted in order to assure that the CHRIS Project Team has sufficient time to complete the prerequisite development work needed to enable organizations to roll out either or both of the CHRIS Workflow processes.

<b>PAY PERIOD</b>	<b>WORKFLOW ROLL-OUT DATES:</b>	<b>WORKFLOW SUBMISSIONS* DUE BY:</b>
<b>12</b>	19-May-2002	24-Apr-2002
<b>14</b>	16-Jun-2002	22-May-2002
<b>16</b>	14-Jul-2002	19-Jun-2002
<b>18</b>	11-Aug-2002	17-Jul-2002
<b>20</b>	8-Sep-2002	14-Aug-2002
<b>22</b>	6-Oct-2002	11-Sep-2002
<b>24</b>	3-Nov-2002	9-Oct-2002
<b>26</b>	1-Dec-2002	6-Nov-2002

\* (See the **Checklist for Organizations Implementing Training (TR) and/or Human Resources (HR) CHRIS Workflow Processes** on the previous page for the specific information which needs to be provided.)

## Sample CHRIS Workflow Processes

The sample workflow processes that follow are provided as guides to organizations who have not yet submitted their information needed by the CHRIS Project Team to develop and design CHRIS workflow processes that will meet the organization's clearance, review and approval processes in the most efficient manner. In reviewing these samples, organizations should examine their current processes for approving requests for training (TR) and personnel actions (HR) and eliminate any unnecessary steps which do not add value to the overall process(es).

### A. TR Sample

**Point of Contact:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**Email Address:** \_\_\_\_\_

**Date:** \_\_\_\_\_

Step	Workflow Role	SF-182 Signature Block
1	1 <sup>st</sup> Approver	Block 26a
2	2 <sup>nd</sup> Approver	Block 27a
3	3 <sup>rd</sup> Approver	Block 28a
4	Budget	Block 29a
5	Training Processor	None

### B. HR Sample

**Point of Contact:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**Email Address:** \_\_\_\_\_

**Date:** \_\_\_\_\_

Step	Workflow Role	SF-52 Signature Block
1	1 <sup>st</sup> Approver	None
2	2 <sup>nd</sup> Approver	Block 5
3	3 <sup>rd</sup> Approver	Block 6
4	Budget	None
5	Team Leader	None
6	Sub Agency Approver	None
7	Administrative Officer	None
8	HR Processor	N/A

### **C. Format for Submitting Names of Individuals on Drop-down Lists**

Organization: \_\_\_\_\_ Org. Code: \_\_\_\_\_

Workflow Role:      **1<sup>st</sup> Approvers:**                      **EMPLID #**

John Doe	12345
Mary Doe	23456

**2<sup>nd</sup> Approvers:**

John Smith	34567
Mary Smith	45678

**3<sup>rd</sup> Approvers:**

William Jones	56789
James Russell	67890

**Budget:**

Michael Johnson	78901
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**Training Processor:**

Michelle Brown	89012
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Questions on either process or submission format should be referred to Chuck Patterson, CHRIS Project Team, at 202-586-8513.